Admin 101

Welcome! This guide provides helpful information and examples to those new to Clerk Chat administration and management of basic settings for their Team or organization.
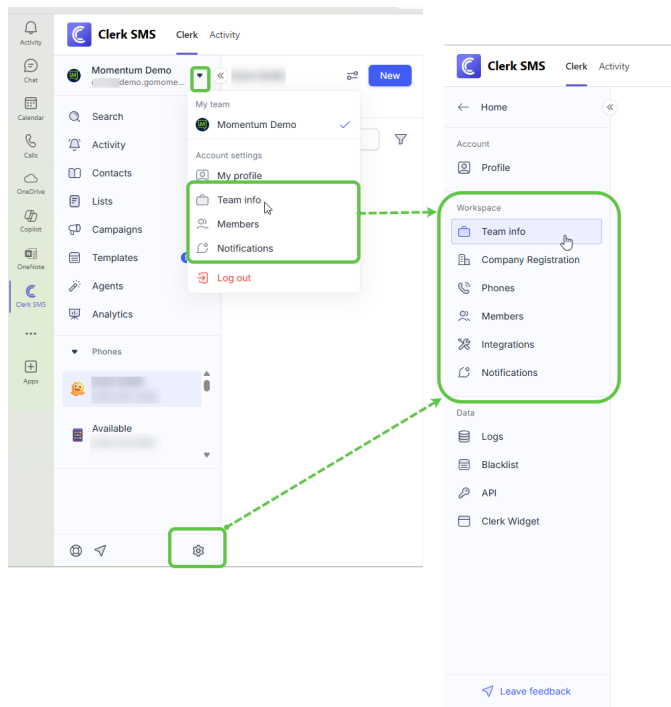
Workspace Settings

While logged into Clerk Chat as a Workspace Owner or Administrator access to workspace settings is available.

The Workspace administration settings menu offers access to the following:

- Team Info
- Company Registration (First Admin Task!)
- Phones
- Members
- Integrations: Ultimate Package
- Notifications

Open the Workspace settings section by clicking on Settings or the drop-down next to your Org name as shown here:

Team Info

Settings > Workspace > Team Info. This section offers access to the basic setup for the organization/account.

Settings related to Contacts, Messages, and the ability to Create or Delete teams can be found here.
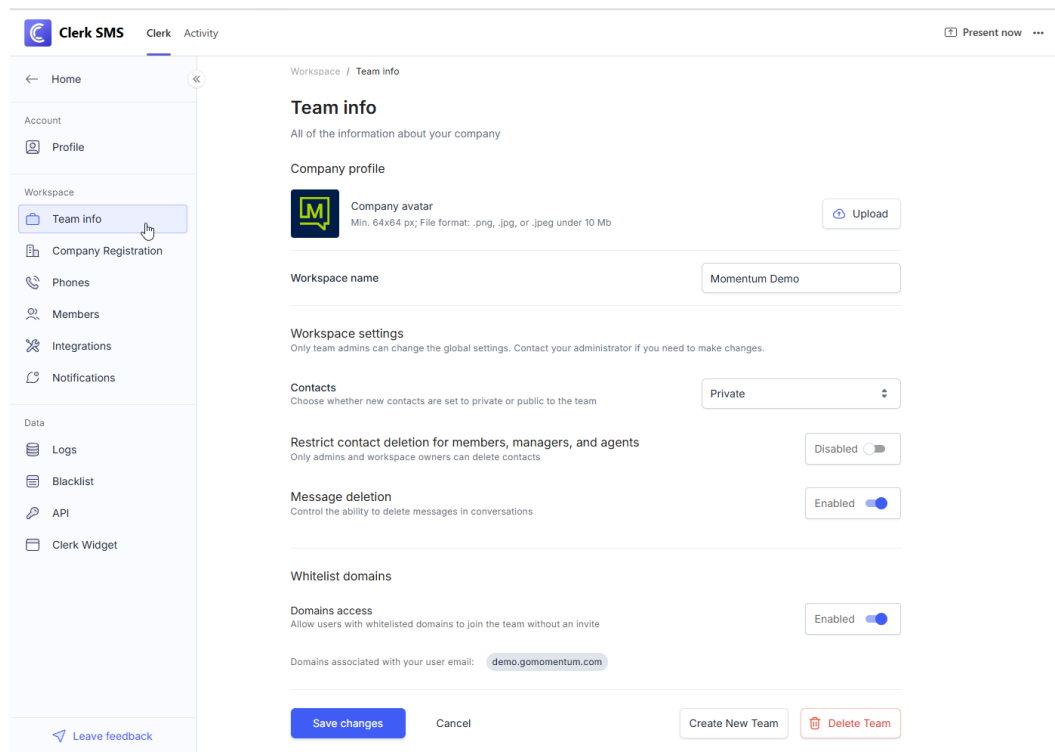
Company Registration

Settings > Workspace > Company Registration
FIRST TASK!!

This area provides a wizard to walk you through the initial process of getting your brand/company registered for **NON**-Toll-free numbers with TCR. Complete the information requested and submit the information. If you have more than one Clerk Chat organization (you purchased two separate Clerk Chat packages) complete this process for one and then provide the full list of numbers for each Org to the service provider so they may facilitate brand compliance for both. You will receive progress notifications in this area for needed changes to get approved, or that the application has been verified as approved.
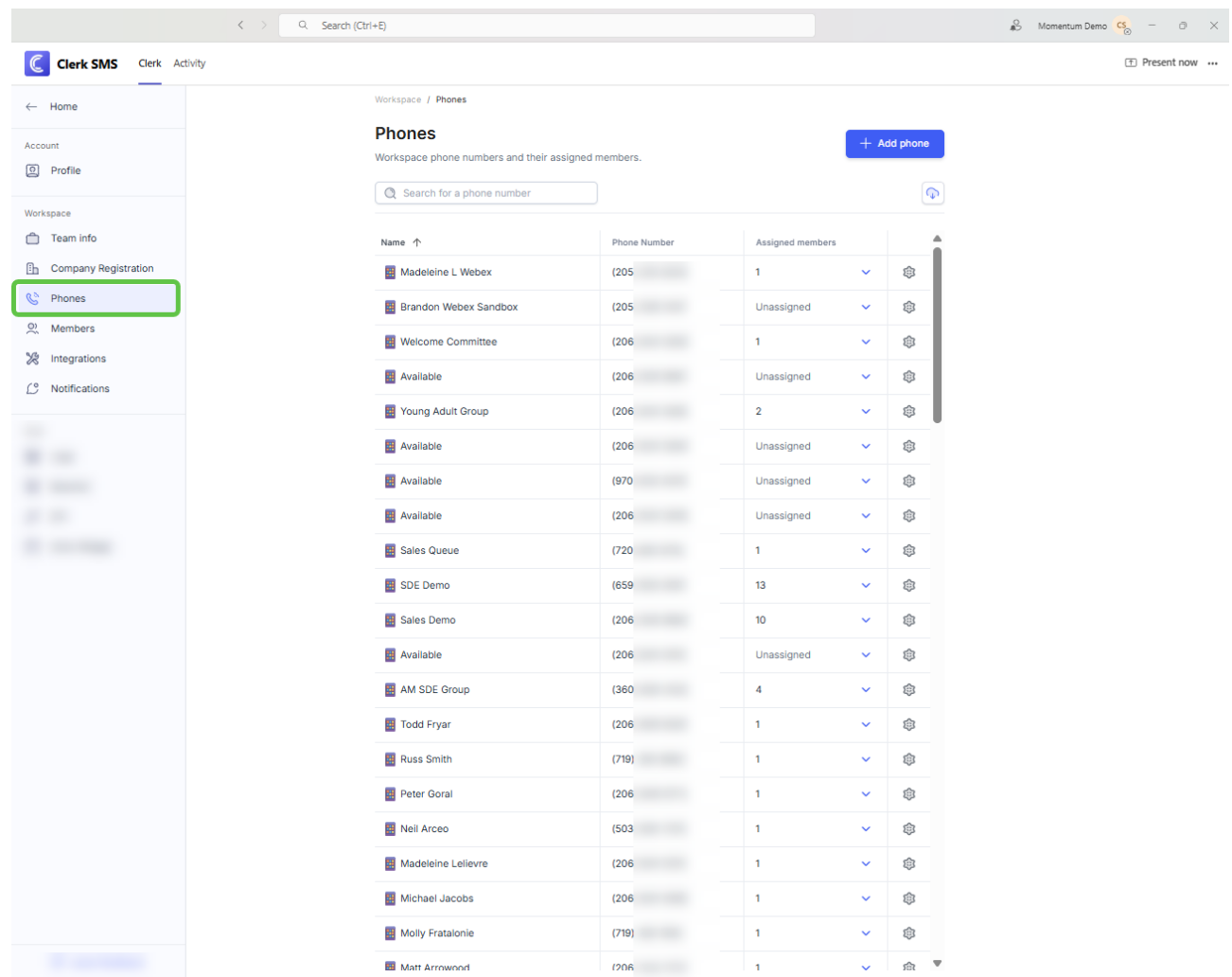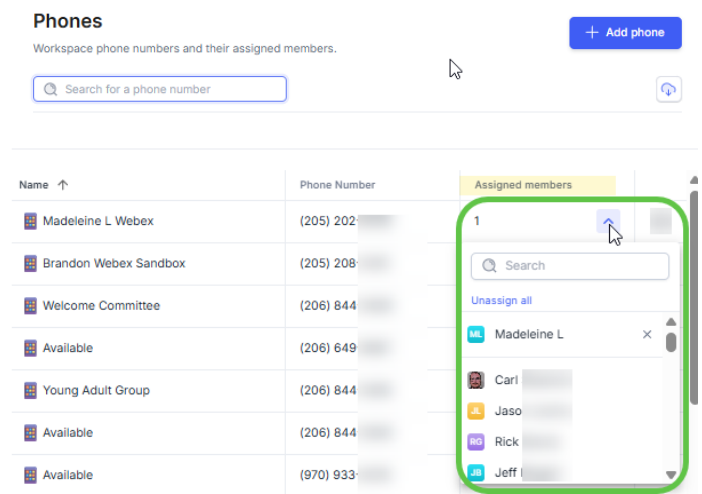
Phones

Settings > Workspace > Phones
This area provides admin access to the list of the phone numbers for SMS inboxes or members, along with the assignment information and the basic settings for each.
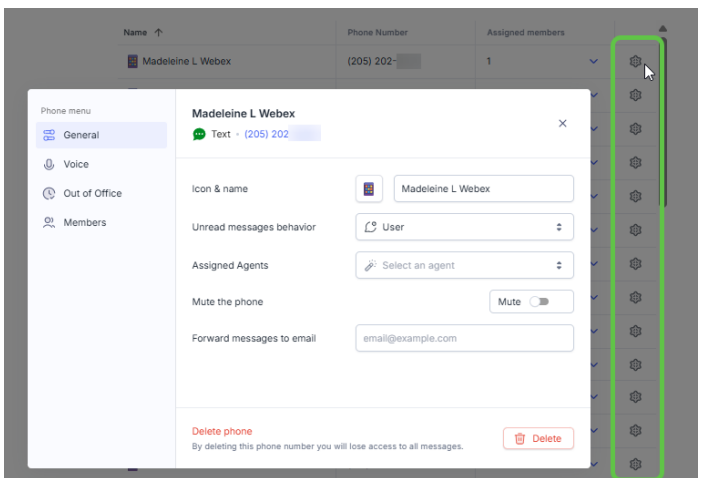

Administration tools to Search, manage assignments, download the list to a CSV or add a new phone number are provided here, as well.

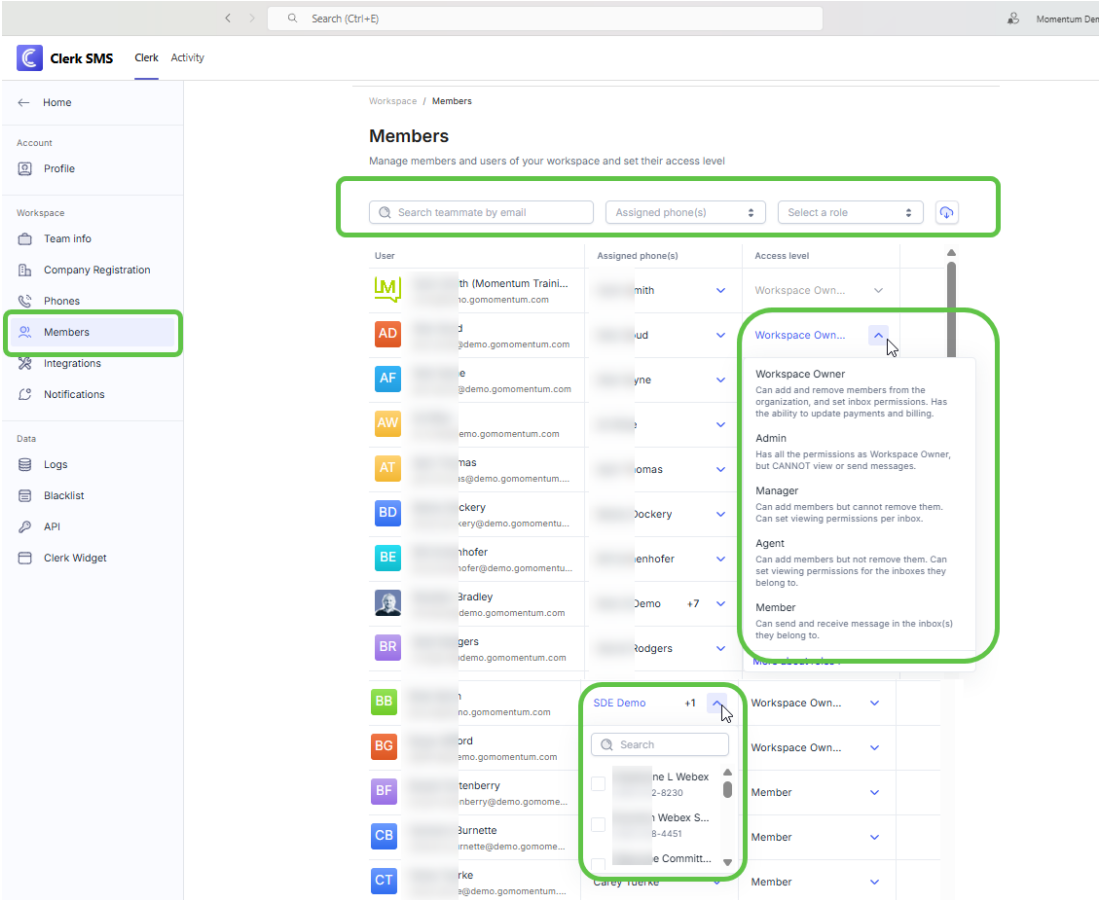Member assignments per line can be managed from the drop-down in the table or in the Members section of the Settings for each line which is accessed via the gear icon in the far right column.

Settings also offers access to manage message notification settings, forwarding options, out of office behaviors, and (if authorized) the ability to delete the phone number/inbox (and all its messages in history)
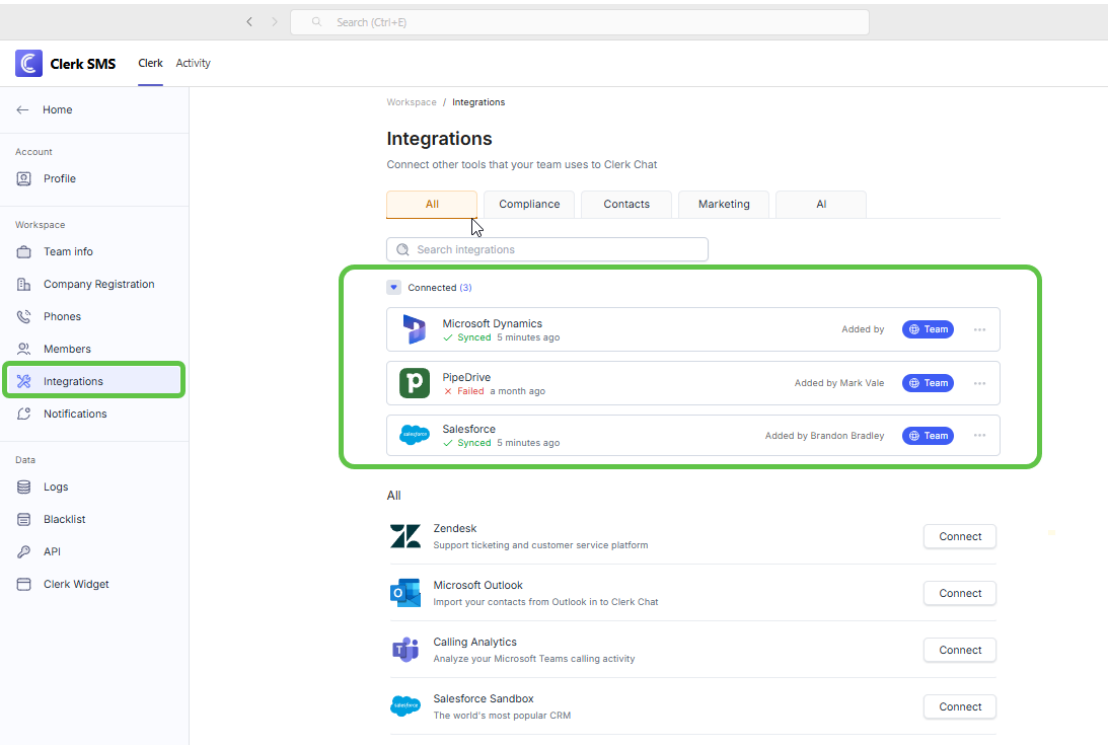
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UÚVQ¦ÞŒ⁄ÆÁ\|œ¶ æ^ÁÁæ&\æ‡^ÁU ÞŠŸ÷Áã{ ã¬ãc^¦A&[}}^&œ§]}•Á[Áœ¶^Á^Á‑lå¦Áæ‡c¦Áhc^*¦æœ§}•Á

Notificationg

Settings >Á Workspace > Notifications
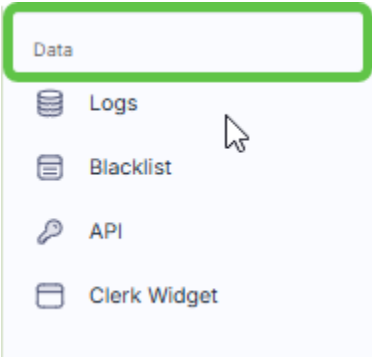This area allows the admin to mute or unmute all inbox notifications

Data Settings

While logged into Clerk Chat as a Workspace Owner or Administrator access to Data settings is available.

Go to Settings > Data. The Data administration settings menu offers access to the following:

Logs

Export any data / conversations from any phone number / inbox.

Select one or more phone numbers to export to csv.

Blacklist
Ultimate Package Only - Add and manage a list of any words that your members (users) cannot include in texts (blacklisted words).

API
Ultimate Package Only - Use at own risk.
Generate the API key to access the Clerk Chat API programmatically.

Clerk Widget
Ultimate Package Only - Use at own risk. Collect website leads using a widget from Clerk Chat.